Global and China Carbon Fiber and CFRP Industry Report, 2018-2022

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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Abstract

As a new generation of reinforced fiber boasting intrinsic properties of carbon material and excellent processability of textile fiber, carbon fiber is the one with the highest specific strength and specific modulus among mass-produced high-performance fibers.

The global demand for carbon fiber approximated 84.2 kt in 2017, showing a CAGR of 12.7% between 2012 and 2017. With the growing demand from such markets as new energy vehicle and wind power, the world's demand for carbon fiber will grow at an annual average rate of 10.0% or so from 2018 to 2022. In 2017, the demand for carbon fiber in Chinese market reached 23.5 kt, soaring 19.9% from a year earlier and sharing 27.9% of global total, and the figure will rise to 26.3 kt in 2018 and close to 400 kt in 2022.

In 2017, the world-renowned carbon fiber producers raised prices successively in the wake of a steady growth in market demand, driving the carbon fiber market size to jump by 14.2% year on year and hit USD2.4 billion. Carbon fiber is primarily bonded with adhesive substrate into carbon fiber composites and then launched into the market. The market size of carbon fiber to that of carbon fiber composites stands at roughly 1:10. The global carbon fiber composites market was worth about USD25.1 billion in 2017, up 12.1% on an annualized basis, and the figure is expected to be USD28.4 billion in 2018 and more than USD45.0 billion in 2022.

Carbon fiber composites were first utilized in fields like sports & leisure, aviation and aerospace, and it did not get used in industrial fields until the 20th century. As carbon fiber has high cost of use, the carbon fiber composites mainly find application as a kind of structural material in the aviation and aerospace field currently around the globe (the global demand for carbon fiber from aviation and aerospace made up about 60% in 2017). During 2018-2022, the global market size of carbon fiber composites used in aviation and aerospace will maintain a growth rate of at least 9.0%. It is in recent years that the demand from automotive sector for carbon fiber is growing by leaps and bounds. The market size of carbon fiber composites used for cars presented a CAGR of 29.0% between 2013 and 2017, and is anticipated to keep a growth rate of above 30.0% from 2018 to 2022.

The global carbon fiber market remained stable, with key players consisting of Japanese Toray, Teijin, Mitsubishi Rayon, U.S. Hexcel, German SGL, and China's Formosa Plastics. In 2017, the world's top five giants had the combined market size as a percentage of 67.8%, of which Toray led the pack and held 29.2%. As concerns Chinese peers, Zhongfu Shenying Carbon Fiber, the biggest producer of carbon fiber in China, seized 5.0% shares worldwide.

As far as segmented products are concerned, in 2017, over 70% of large-tow carbon fiber market shares were firmly held by Toray and SGL, and more than 50% of small-tow carbon fiber market shares went to Toray, Teijin and Mitsubishi Rayon. It follows that Japanese vendors are quite competitive in the global carbon fiber market.

Due to sophisticated manufacturing process and high technical content as well as technical constraints and lack of equipment, Chinese carbon fiber industry is left behind overseas countries in terms of either technologies or production scale. Nevertheless, the carbon fiber industry is advancing aggressively with the policy support in China in recent years, with breakthroughs made in technologies and industrialization of T300, T700 and T800 carbon fiber successively brought into reality.

Global and China Carbon Fiber and CFRP Industry Report, 2018-2022 highlights the following:

◆Carbon fiber (classification, level of technology, industry chain, etc.);

◆Global carbon fiber market (status quo, supply & demand, competitive landscape, patents, prices, development trends, etc.);

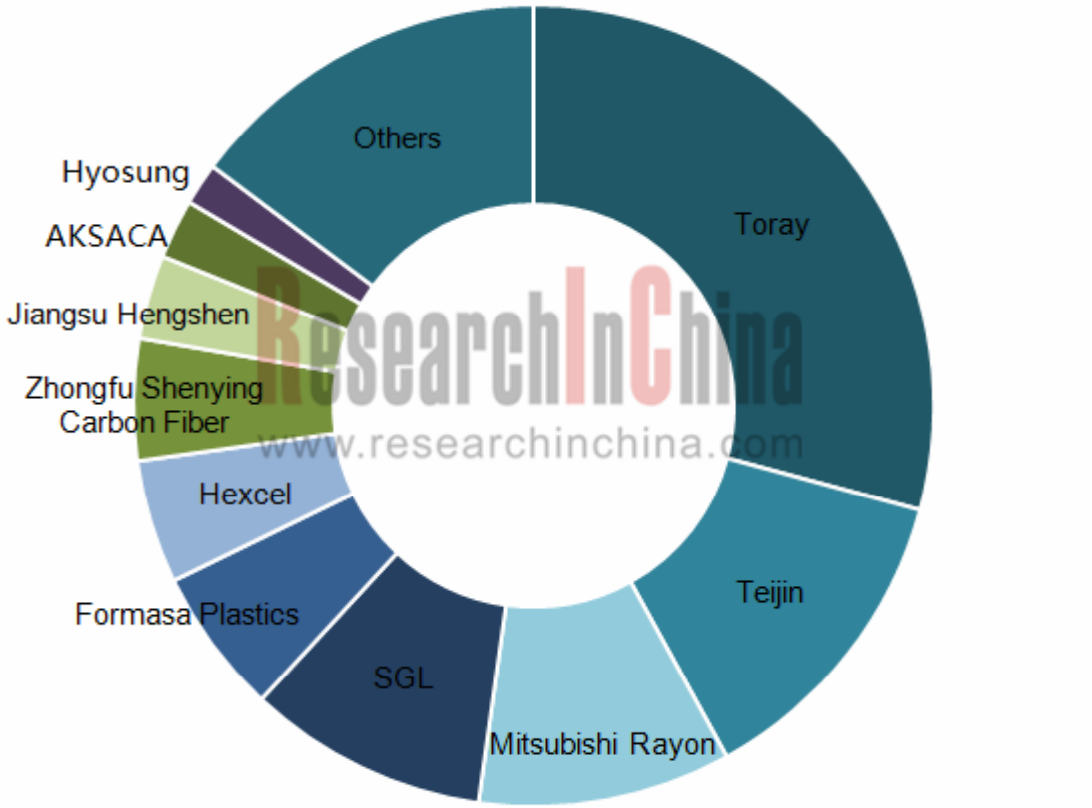
◆Chinese carbon fiber market (policies, development status, supply & demand, industrial layout, import & export, competitive pattern, prices, development tendencies, etc.);

◆Carbon fiber composites market (size, structure, cost structure, patents, competition, etc.);

◆Upstream carbon fiber precursor and downstream (aviation & aerospace, automobile, wind power, sports & leisure, etc.) (market size, applications, etc.);

◆11 foreign and 20 Chinese carbon fiber manufacturers (operation, carbon fiber business, etc.).

Competitive Landscape of Global Carbon Fiber Market, 2017



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